



Streamlining Matter Management

Law firms find gains in productivity and efficiency with case management technology.

Almost every law firm struggles with efficiency. For many, it's just not in their DNA. The idea of providing legal services efficiently can seem at odds with a professional ethos that requires lawyers to investigate every possible angle to advance their clients' arguments. Efficiency is certainly not built into the business model that most law firms prefer – that of billing by the hour. But efficiency is nonetheless essential, especially as firms face heightened competition, an increased desire on the part of clients for alternative fee arrangements, and the realization that corporates are increasingly looking to bring work in-house.

Modern case management and matter management technology hold the potential to make law firms vastly more productive and efficient, and to free up

attorneys for more strategic work. Those gains come from two places. There is the technology itself, of course, as a complete case and matter management platform will manage everything from document and document assembly to matters, client information, and workflow.

But the very process of adopting and implementing a unified case and matter management system, even before any attorneys begin to use it, is often instructive on its own. In deciding upon the best way to introduce and leverage new technologies, many firms say they've been obliged to rethink the way they do business – and, as a result, to noticeably improve their processes and productivity.

.....

Modern case management and matter management technology hold the potential to make law firms vastly more productive and efficient.

.....

"We used to have two support people for each attorney. Now, we work on a five-to-one ratio." – IT manager, midsized law firm

TRANSFORMING OUTDATED BUSINESS PROCESSES

For a firm to usefully transform its business processes, it's important for firm leaders and technologists to understand the inner workings of the firm as they currently stand: where the business processes are working, and where they're failing. The IT manager at one mid-sized firm began by talking to administrative assistants at his firm, asking them where their work was similar and where it was different. One head of IT operations at a larger firm hosted a series of lunch meetings to try to better understand the lawyers' business processes. "We wanted to find out why they did things in a certain way, what documents they used, and how they thought things could be best improved. Then we could try to find efficiencies," she says. The CIO of a global firm hired business analysts to interview the firm's lawyers.

Once a firm's business processes are thoroughly understood, it may be possible to reassign some parts of the legal work to staffers who are not lawyers, says the IT manager at the mid-sized firm. By standardizing the workflow, he says, the firm was able to identify some parts of the process that didn't require a lawyer to make a judgment, and could be handled by a paralegal or other staff. That's especially important in a market such as insurance, says the CIO of the global firm, where there is downward pressure on fees. "If we continued to do it the old way, we would probably be losing money on some of the work we do," he says. The platform chosen by his firm – 3E – "is allowing us to actually do the work profitably."

STREAMLINING NEW BUSINESS INTAKE

New business intake is a logical place to start with a new technology platform, firms say. That's because new business intake is often governed by a well-defined set of rules, and doesn't vary wildly across different legal specialties. "That's a good introduction to the technology," says the head of IT operations at the large firm. "After that was working well, we started looking at different practice groups."

The benefits of using a unifying technological platform for new business intake can be immediate and dramatic. At one firm, new business intake had always been a paper-based process. A lawyer would fill out

a form with client particulars, which would then go to the accounts department. Then a workspace would be created and the information would go to yet another department. Time elapsed: one to three days. After adopting case and matter management technology, says the IT manager, "Everyone was opening matters and time-recording in about ten minutes."

At one regional firm, "I had a secretary tell me that before, if she had to open five matters, she would clear her afternoon," says the IT project manager. "Now she can open five matters in 25 minutes."

"If we continued to do it the old way, we would probably be losing money on some of the work we do." – global law firm CIO

IMPROVED DOCUMENT MANAGEMENT; MORE CONFIDENT BILLING

No attorney wants to spend hours looking through files in search of a particular contract. No associate wants to spend an afternoon writing a document that is only slightly different from one completed a few months earlier. Yet without the appropriate technology, many firms rely on haphazard document management systems. At one larger firm, the wills and probates practice had to refer to four different spreadsheets to determine where documents were stored. If a client called to ask if they had a will with the firm, there was no way for the attorneys to easily check. No surprise, then, that one of the most important advantages of a case and matter management system is that it helps firms better organize their documents.

"We started off using it as a document management system," says the IT manager at the midsized firm, who started using an early matter and case management system back in 1998. "It enabled us to work off current documents stored in a centrally located area."

The wills and probates department at the larger firm now uses a case and matter management solution, giving it a complete log of wills and other files. Even files that would previously have been stored off-site are easily accessible.

Document management combined with matter mapping makes attorneys significantly more productive – not to mention happier, says the head of IT operations. "They can find precedents and create letters very quickly," she says. "They absolutely love it."

This same head of IT operations says her technology solution has enabled the firm to become more thorough, and confident, in its billing. "We were missing over \$40,000 because something was written in a file but didn't make it to the bill," she says. "Once you send the final bill, you can't send another for five dollars, please."

.....
Document management combined with matter mapping makes attorneys significantly more productive.
.....

INCREASING THE TOP AND BOTTOM LINES

Sophisticated case and matter management platforms can also enable firms to take on work they would otherwise have to refuse, and to make money on work that would otherwise be unprofitable.

One midsized firm had been turning away work in their wills, trusts, and probates department, as they were only able to handle about 40 to 50 matters a month. They managed their work on a large whiteboard, where the staff noted the names of clients, completion dates, and milestones. As archaic as it sounds, that wall did have one advantage: it established a common workflow. Seven months after bringing that workflow into [MatterSphere](#)[®], the practice was able to quadruple the amount of work it was doing while bidding more competitively and strengthening its profitability.

It's not just one department. Firmwide, the technology platform "has allowed us to be lean," says the IT manager. The firm used to have two support people for each attorney; now, it works on a 5:1 ratio. Meanwhile, the firm has increased revenues by about 25 percent.

The IT manager continues to look for new ways to use the technology platform to make attorneys more productive and efficient. His most recent initiative is a paper-lite project, in which each attorney's mail will be scanned as it comes in. "If a lawyer is away for two to three days, they can still get their post delivered while they're on the move," he says. "They don't have to guess about anything at all."

While his firm has been particularly aggressive in the use of technology, the benefits his firm has gained – less duplication of work, leaner operations, and higher revenues – are hardly unique. Instead, they're available to any firm willing to examine its own work processes, and to embrace technology as a path to systematizing and modernizing them. As clients increasingly demand both operational and legal excellence, sophisticated case and matter management platforms have become a tool essential to the financial health and sustainability of the modern law firm.

.....
*Meanwhile,
the firm has
increased
revenues by
about 25 percent.*
.....

"I had a secretary tell me that before, if she had to open five matters, she would clear her afternoon. Now she can open five matters in 25 minutes."

– IT project manager

The intelligence, technology and human expertise
you need to find trusted answers.



the answer company™
THOMSON REUTERS®